Oman Oil and Gas Report Q2 2016

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Abstracts

BMI View: We believe that Oman's oil industry still provides new and lucrative opportunities ranging from the approval of additional upstream projects to new discoveries, with a focus on offshore resource finds a unique new area of interest. However, due to the prevailing low price environment, smaller energy producers such as Oman will have more challenges attracting upstream investment.

Latest Updates And Key Forecasts

The signing of a heads of agreement for the second phase development of the Khazzan tight gas field has led us to revise up Oman's gas production forecast. We believe the two-phase Khazzan project and a healthy number of smaller developments will boost the overall output from around 33.2bcm in 2015 to a peak of 51.8bcm in 2025, with minor declines until the end of our review period.

Oman's 2015 crude oil and liquids production averaged 969,100b/d in 2015. We forecast the output to peak at 988,800b/d in 2017, followed by gradual declines in the second half of our review period. We hold our view that the downside risks to Oman's oil production forecast arises from the low oil prices, which weigh on comparatively costly enhanced oil recovery (EOR) projects.

We hold our estimates that Oman's gas consumption continued to increase rapidly in 2015, posting a 6.3% year-on year (y-o-y) increase to 25.4bcm. Fuelled by the country's rapid industrial development and growing use of gas for power generation, Oman's gas demand is set to grow by an annual average rate of 7.3% between 2016 and 2025 to 50.6bcm.

State-owned Oman Oil Company Exploration & Production (OOCEP) plans to invest up to USD4bn over the next five years to boost output despite low oil

prices, according to a statement by the Chief Operating Officer Suleiman al-Zakwani in December 2015.

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